

511 Bicycling Focus Group Findings Report

Submitted by Wolfe/Doyle Advertising

I. Background

Focus groups were conducted in November, 2001, among Bay Area bicyclists who searched for bicycling-related information within the past 6 months. The purpose of this research was to understand attitudes and behaviors related to bicycling information usage, in general and with respect to the current RIDES.org site and a future, bikes-specific version of that site. These findings (and other learning) will be applied primarily to marketing communications planning and product development in preparation for the Bay Area launch of the Web Portal. A secondary application of these findings will be for planning 511 phone services, which will offer bicycling information as a key component.

II. Methodology

Focus groups were conducted in two locations -- San Francisco and San Jose -- in order to include respondents from areas where bicycling for transportation is most prevalent. The groups involved a total of 12 participants, recruited according to the following criteria:

- Aged 20-39
- HHI \$20,000 to \$80,000
- Bike for other than recreational purposes at least twice a week
- Reside in San Francisco, Alameda, or San Mateo County
- Have searched for or requested bicycling information within the past 6 months
- Use the internet for personal use at least twice a week
- Are potentially interested in a Web site exclusively for Bay Area bicyclists

The criteria for recruiting participants were established on the basis of usage demographics revealed by the RIDES Commute Profile 2001, as well as on the basis of target audience discussions with MTC management and its agencies.

The focus groups agenda was structured to cover four key areas of discussion:

1. Category definition, salience, and options -- A topline discussion of how participants define bicycling information, its importance, what their options are for this type of information, and how they choose between those options.

2. Usage occasion/relevance -- An exploration of the specific factors that trigger awareness and usage of any/all sources of bicycling information, with emphasis on when these trigger occur, how they may vary, and how they influence information search/selection.

3. Current RIDES.org as an option -- Based on a homework assignment, a discussion of factors that would encourage or discourage trial and usage of the current site, including specific likes/dislikes.

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4. Enhanced RIDES.org as an option -- A group exercise to "build" an ideal bicycling information service, to see how many of the planned features for the enhanced site would arise spontaneously. This would be followed by a review, evaluation, and discussion of enhanced bicycling information features, and a brief exercise to explore perceptions of what types of people would/would not be likely to use the new bicycling information site.

Specific questions and all group discussion were recorded on videocassettes, which will be made available to MTC. The moderator's guide is attached (Attachment A).

III. Findings

1. Category Definition, Salience, and Options

Definition -- Both groups expressed very similar views of what constitutes "bicycling information", and seemed to describe the same four basic categories of such information:

- Navigational -- Information that tells you how to get to where you want to go, such as maps of bike lanes and trails, and information on bike-friendly transit systems.
- Safety -- Rules of the road, bike-friendly/safest routes, particular hazards, and other information to avoid accidents.
- Commerce -- Equipment information such as dealer locations and product reviews, bike repair and rental locations, classified ads, and manufacturer products and promotions.
- Community -- Information about bicycling groups and events, revolving around either recreational or advocacy interests.

Worth noting is that the commerce and community information categories reveal a true lifestyle interest in bicycling. In separate research among traffic, transit, and carpool information users, all displayed some level of lifestyle interest in their mode of transportation but not nearly to the same extent as bicyclists.

Salience -- Overall, bicycling information can be very important, but only occasionally. It is most important when the rider is considering an unfamiliar route, and when the risk of getting lost or in an accident seems greatest. As one respondent said, "*It becomes more important to me the farther I get from home.*" Respondents also noted that

information is important when someone is new to bicycling and needs initial navigational and safety-related information. However, for more routine, familiar trips such as to work or the corner store, respondents said no information is needed and they do not seek it out.

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Options -- Unlike their traffic, transit and carpooling counterparts, bicyclists seem to feel that word-of-mouth is one of the best sources for information. Friends who ride, clubs and advocacy groups (especially the San Francisco Bicycle Coalition), are all good sources. The ultimate source, it seems, is the staff at a bike shop ("*They're saturated in it.*"). Word-of-mouth assures bicyclists of information from a local, experienced source.

Respondents said they also liked the internet for its maps and immediacy, but noted that there are few known sites about bicycling in the Bay Area. Many said they go to general land use sites like Bureau of Land Management or Parks & Recreation, or use driving directions from Mapquest.

Respondents also mentioned several other options for bicycling information, but didn't seem to single any of them out in any way: books, newsletters, Yellow Pages, transit stations, TV and radio, newspapers (The Guardian), libraries, schools, and city government.

2. Usage Occasion/Relevance

Respondents talked about occasions when bicycling information is currently relevant, and also indicated potential situations when new types of currently unavailable information would be relevant ...

a) Current Occasions -- Respondents explicitly stated at least three occasions when bicycling information is currently relevant.

As mentioned, they said information is important when a new bicyclist needs to get mentally prepared and geographically oriented, or when an experienced bicyclist plans a ride to a new, unfamiliar destination. New destinations, they said, could include places inside or outside the Bay Area, and in fact there seemed to be strong interest (in the San Jose group) in bicycling vacation destinations, (such as Lake Tahoe). Within the Bay Area, a new destination could include leisure rides while visiting a friend or relative.

The third occasion when information seems important is when a bike needs maintenance or repair, or when the bicyclist is thinking of buying equipment or accessories.

b) Potential Situations -- At various points in the focus groups, bicyclists indicated that they would like to express their complaints or suggestions on bike-related issues, but

aren't sure who to contact or where to find contact information. If such information were available, it would likely prompt incremental occasions when bicycling information would be relevant.

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Another potential situation when bicycling information would be relevant is just about any time the bicyclist considers how to get to a destination that they could conceivably get to by bike. When the destination is somewhat unfamiliar, bicycling often falls out of consideration because the bicyclist faces too many unknowns. For example: exactly how to get there, are there bike-friendly/accessible routes, how strenuous or dangerous the trip would be, what transit connections would be available, and whether there would be a safe place to lock their bike. However, if an information source could answer these questions in one fell swoop, respondents indicated they would use it frequently and be motivated to ride their bikes more often. *"If I had (easy access to) that information", said one respondent, "I would be much more apt to grab my bike and go, rather than just hit the car for default."*

3. Reactions to RIDES.org

Most respondents had not previously heard of or been to the RIDES.org site, but were asked to look at it and formulate their impressions as a homework exercise prior to the groups. Generally, respondents seemed pleased with the notion of a Web site for Bay Area bicycling information, but felt several execution aspects needed improvement ...

a) The bicycling content on RIDES.org does not initially seem appropriate for experienced cyclists -- Respondents agreed emphatically on this point, saying the content appears *"a little too fluffy"*. With heavy emphasis on the benefits of bicycling and other information that seems aimed at more novice riders, the site *"seems like it's written for somebody who's never ridden a day in their life"* (San Jose respondent). While respondents acknowledged that there's a need for such information, they felt it shouldn't dominate the site. Instead, they suggested that it be relegated to a "Getting Started" tab on the home page, which new bicyclists could click on for more information.

b) Respondents suggested making the Bike Resource Guide much more prominent, and enhancing it -- They said the Guide was closer to the type of *"practical"* and *"useful"* information that would appeal to the interests and needs of experienced cyclists. Also, the idea of a "Mapquest for bikes" came up spontaneously in both groups as an extremely useful resource to add -- if such a resource could be developed. The RIDES site *"wasn't what I was expecting"*, said one of the San Francisco bicyclists, adding: *"I was hoping for what we were talking about earlier, where I could put in where I was starting and where I was going and it would give me the best route, by bike."*

c) A site that offers both bicycling and driving information seemed inappropriate -- Although respondents were surprisingly low-key about their bicycling politics, they clearly feel at odds with drivers on the road and want greater public acceptance of bicyclists. These feelings feed a desire for more bikes-specific resources (like a Web site) and are accompanied by a slight repugnance for resources that further encourage driving. They suggested getting rid of any driving information, and that if information about another mode of transportation were to be included, it should be transit information.

d) The bicycling section of RIDES.org seemed cluttered and wordy -- Respondents suggested a "cleaner" layout, meaning one that's less cluttered with verbiage. Here and at other points in the focus groups discussion, respondents indicated they wanted such a site to just look cooler, more designed and more contemporary -- more like the materials from Cannondale and Specialized, or a Web site designed by Razorfish (www.razorfish.com).

4. The Ideal Bicycling Information Service

Discussion of an ideal bicycling information service was prompted by an exercise in which respondents collaborated on conceptually building a service from scratch. To stimulate their thinking and creativity, they were encouraged to focus on what would be ideal for them, and not on practical considerations such as costs, available technology, or development time.

a) All respondents built ideal information services that are wholly or partly Web-based -- The immediacy, interactivity, depth of information, and visual aspect of the Web made it the unanimous choice for delivering an ideal bicycling information service. However, as will be discussed, some respondents also added innovative elements to make information accessible during bike trips, and interesting to a more mainstream audience.

b) A "Mapquest for bikes" was the most common theme in various "ideal" services -- In both San Francisco and San Jose, several respondents created ideal services that would apply Mapquest functionality to bicycling information. To some extent this idea popped up in conversation before the exercise, which probably influenced people's subsequent brainstorming. Nonetheless, it's clear that respondents loved the idea of a "Mapquest for bikes", which would let them enter a starting and ending point, and receive complete navigational and safety information for their specific route.

However, unlike Mapquest's results offering only one set of directions, bicyclists wanted multiple route alternatives such as:

- the safest route ... with bike lanes, the least congestion, and fewest hazards
- the most direct route ... the one that will get them there fastest
- the easiest route (with color-coded gradients) ... to avoid hills and over-exertion

In discussing these types of route alternatives, bicyclists seemed keen on navigation, exploration, and choosing -- rather than being told "the way" to get somewhere.

b) The ideal service would have a cool, sporty and maybe even somewhat commercialized, lifestyle appeal -- Respondents indicated that the look and feel of their ideal service should capture the personality or imagery of entities like Lance Armstrong, Sports Illustrated, Cannondale, or Specialized. The marketing and media buzz from these entities gives bicycling a cool, sporty, lifestyle aura. It's in this light that respondents indicated that they like to see themselves -- and not in the tough, punk, and radical aura of San Francisco bike messengers and bicycling activists.

Some respondents indicated mixed feelings with regard to the prospect of routinely visiting a Bay Area, bicycling-specific Web site. Specifically, though they would like to have access to such a site, a few felt that frequenting it day-to-day would typify a truly hard core biker -- which they don't see themselves as. Said one respondent: *"I consider a lot of bikers in the city to be kind of cultist ... if I don't consider myself a hard core biker, or I'm not a bike courier, I'm not going to actually seek out a bike Web site."* That's why a few respondents created ideal bicycling information services that were patterned after, linked to, or embedded in more general lifestyle destinations like CitySearch, craigslist, or Hotmail.

c) Navigation, safety, community, and commerce were again the prevalent types of information -- These categories of information emerged in this part of the groups just as they did in the beginning, when discussing how "bicycling information" is defined. Almost all respondents built ideal services that conveyed rich amounts of information in all four categories. Worth noting was the consistency with which respondents included information about bicycling equipment; they definitely like to shop for and talk about gear.

d) To make bicycling information available during bike trips, some respondents recommended interactive kiosks and 800 phone service -- Ideally, respondents would want the information and services offered by bike shops to be available at all times, in all

places where they ride. That's why a few respondents recommended kiosks or a phone service.

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The kiosks would provide Web-based information on demand, would be prevalent along bike routes and in transit stations, and would dispense emergency supplies such as patch kits or air pumps. An 800 phone service would be available for summoning emergency mobile services for riders who are injured, lost, fatigued ("bonked"), or whose bikes need repair, and as a default version of the Web site for those who don't have a computer.

Coincidentally and worth noting: interactive touch-screen kiosks were also described during the ideal information service exercises among transit users and carpoolers.

e) To make bicycle transportation more mainstream, a few respondents suggested the use of broadcast media -- Some mentioned promoting their ideal information services on TV and radio, and the San Francisco group discussed with interest the notion of a "Bike Talk" program patterned after the show, "Car Talk". These ideas seemed motivated by the need to bring bicycle transportation more into the popular culture, so that bicyclists might feel more community recognition, acceptance and support.

5. RIDES.org Features

Respondents were given a list of potential features for a new, bicycling information Web site, and were asked to rank and discuss the importance of these features. They were also asked to list which feature was the most important and why.

Of the seven features, four were ranked 4.25 or higher on a scale where "1" was "not at all important" and "5" was "very important". Three features were ranked 3.2 or lower. Note that since this was qualitative research, figures such as these represent the thinking of the focus group respondents, and should not be projected to a larger group without a quantitative survey. However, these findings indicate that the groups saw a fairly clean split in the importance of features, with those related to navigation and safety ranked significantly higher than all others.

The two leading features were the intelligent interactive maps with zoom in/out functions and the trip planner. The maps were ranked an average of 4.5 and selected as "most important" by 25% of respondents. The trip planner was ranked an average of 4.3 and selected as "most important" by 33% of respondents. Respondents favored these features because they seemed to help remove the discomforting unknowns of a bike trip along an unfamiliar route. Some respondents envisioned these features working together, and a few suggested that both the trip planner and the maps should identify the safest, easiest, and most direct alternatives for a given route.

The next two features in importance were the e-mail directory for transportation decision-makers and the search function. The e-mail directory was ranked an average of 4.2 and

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selected "most important" by 25% of respondents. The search function was ranked an average of 4.3 and selected "most important" by 8% of respondents.

Respondents felt the e-mail directory was important because the collective use of this feature by a large number of bicyclists could effect important positive changes in bicycling policy. Also, but to a lesser extent, respondents felt it was important for themselves as a convenient way to say what's on their mind.

The search function was important when respondents don't know exactly what they're looking for, in which case a "search" lets them enter a general category as a starting point. Also, search results offer multiple responses, which are useful when the user is looking for alternatives or a range of ideas.

The features of lesser importance were as follows: "A chat room will let you communicate with other Bay Area bicycling enthusiasts" (3.2) (0%); "There will be an e-mail format to exchange inquiries and advice between newer and more experienced bike commuters" (3.2) (8%); and "Intelligent interactive Bike to Work Day maps will help you find riding groups and refreshment stations along your route that day" (3.0) (0%).

6. Who Would Use the New Web Site

As a wrap-up exercise, respondents were given a worksheet depicting men and women from 12 different occupations and lifestyles, and were asked to indicate which of the people shown were "most likely to use the new bicycling information Web site."

Respondents could select as many or as few people as they felt appropriate. Most of the men and women depicted were from the same 20-39 age group as the respondents, and were chosen to represent the same approximate household income range (\$20K - \$80K). A range of professions and lifestyles was represented (listed below).

The primary purpose of this exercise was to see how narrow or broad respondents would be in their selections. A secondary objective was to see if any common themes emerged from their selections.

On the average, respondents chose 6 out of 12 people as "most likely users". Women were selected as often as men, even though women accounted for less than half of the people shown on the worksheet and less than half of the respondents in the groups. This

indicates that potential usage of the new bicycling information Web site was not perceived as gender-oriented (even if bicycling in general seems skewed to males).

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The most commonly-selected "likely users" were the female student (selected by 92% of respondents), the female homeless advocate (83%), the ethnic male animator (75%), the college professor (67%), and the videogame developer (67%).

The least commonly-selected "likely users" were the male electrician (17%), the male newspaper columnist (25%), the male bartender (33%) and the ethnic female retail salesperson (33%).

In general, these results indicate that respondents over-selected people that seemed younger, more idealistic, cooler and creative. Conversely, respondents under-selected people that seem more middle-aged, traditional, and more service or process-oriented.

Again, these numbers reflect the assessments of the respondents and should not be projected to a larger group.

6. Incidental Findings

- As mentioned, the bicyclists who participated in these groups were surprisingly moderate and articulate. In fact, they were some of the most articulate respondents of all focus groups across modes. In temperament, they certainly did not fit the image created, in part, by some of the bicycling community's more visible, audible, and militant members -- e.g., bike messengers and Critical Mass.
- Bike lockers seem a fairly simple but potentially effective way to increase bicycling as a form of transportation. San Jose respondents seemed to think very highly of these lockers because they prevent the theft of the many detachable (and expensive) parts on a bike, and said they would be more inclined to ride to places where bike lockers were available.

IV. Assessments and Implications

1. Positioning

- Ideally, the new site should be positioned as the complete lifestyle resource for moderate Bay Area bicyclists, offering navigational, safety, commercial and community information -- If the site could deliver each of the four stated information categories, it

would likely have broad appeal and frequent relevance among local bicyclists. Building frequency is particularly important, as moderate bicyclists don't currently seek information very often.

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The navigational component would be relevant to users when planning a bike trip to or within an unfamiliar area, either inside or outside the Bay Area. However, for users to remember and continually re-use the site's navigational component, it would need to perform extremely well -- meaning, easy to use and very thorough about providing users with a choice between the safest, most direct, and easiest routes.

The safety component would be particularly relevant to bicyclists who are just starting out, as well as to experienced bicyclists for unfamiliar routes. Here again, though, the component would need to perform well. Generalized or obvious safety information wouldn't be compelling -- respondents said so, and indicated they want hard factual data like the level of congestion along a route, the number of accidents, the location of particular hazards, and so on. Respondents indicated that safety statistics might be particularly comforting to new or potential bicyclists, who seem to over-estimate the risks.

A commercial component would be particularly valuable in creating broad appeal and frequent relevance. Even moderate bicyclists seem to have high interest in gear and accessories, and use their bikes frequently enough to require periodic maintenance.

Finally, a community component -- with information about bicycling clubs, outings and events -- would be useful to provide a social aspect to the site, and convey that the Bay Area bicycling community is active, alive and well, and has some clout.

Of critical importance is that this positioning and its components are implemented so that they strongly appeal to moderate bicyclists. By "moderate", we mean genuinely enthusiastic about bicycling, but not fanatical or "hard core". As described, moderates are likely to be the largest segment of bicyclists -- the big middle of the attitudinal bell curve -- and so it is important to appeal to them. However, we learned from this research that a frequently-visited, bicycling-dedicated Web site seems almost by definition oriented to the hard core. Hence, we need to set a precedent by creating a routinely used, bicycling-specific Web site that has a distinctly moderate voice and appeal.

In summary, this positioning opportunity seems great, but it is probably a fairly tall order and no simple thing to effectively implement.

- If a "complete resource" positioning is not viable, the positioning should focus on the navigational and safety components -- While this would be a lesser positioning, it may be more practical in the near term, and would leverage the two categories of information that

respondents seemed most interested in.

2. Positioning of Web Service versus Phone Service

- The Web site should anchor the "complete resource" positioning; as for a phone-based (511) service, consideration should be given to positioning it as a bicyclist's emergency service -- The general lack of a visual field on telephones makes them unable to deliver the type of navigational or commercial information that bicyclists seem interested in. Therefore, a phone-based information service for bicyclists would be too limited, technologically, to deliver the recommended "complete lifestyle resource" positioning. However, some respondents suggested a potentially unique and vital role for a phone-based service, which is to provide bicyclists with universal Bay Area access to specialized emergency services. While many such services are offered by bike repair shops, their locations are too dispersed and their business hours too limited to be readily accessible in an emergency.

Ideally, a mobile repair and/or pickup service would be available throughout the Bay Area and could be accessed by phone. This service could direct callers to a bike shop that might be open and nearby, dispatch a repair van to the bicyclist's location, and provide pick-ups for lost, stranded, or exhausted bikers who can't complete their trip.

3. Target Audience

- The target audience for a new bicycling information Web site appears more articulate, soft-spoken, and consumer-oriented than we anticipated, and more equally balanced between men and women -- Given that the target is not quite the hard core bicycling advocate that we expected, it appears the new bicycling information Web site will have to work a bit harder to get and keep the user's attention. This may require the site to be featured at, or linked to, sites that appeal to the bicyclist's other local or lifestyle interests -- for example, CitySearch, SFGate, or craigslist. It may also require the site to borrow some interest in the form of a bicyclist's marketplace featuring exciting new bikes, accessories, and promotional offers, possibly with a specific section dedicated to women's products.

Another implication of this target audience definition is that design, appearance, and imagery may play an important role. The mood and emotional resonance of the site

could be instrumental in cueing the target that the site is not primarily for die-hard militant bikers or rank novices, but for moderate, experienced bicyclists like themselves.

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4. Media, Events, Publicity

- Bulletin boards at local bike shops would be the most authentic place to publicize the new bicyclist's information site -- Given that the staffs at Bay Area bike shops are regarded as the gold standard for local bicycling information, we should make every effort to publicize the new site in this environment. Although this would not be a formidable medium in terms of reach, it would be effective in terms of image. By association, the site would be regarded as credible, authentic, and local. Respondents indicated that they check these boards with interest, and as a media vehicle they are essentially free.
- Land use Web sites would be effective media for reaching bicyclists when they are in a trip-planning mindset -- Web sites for land management agencies such as BLM and Parks and Recreation seem to attract bicyclists who are planning trail rides. Given that the map and trail information on such sites is not bikes-specific, bicyclists feel like it is the best available but less than optimal. At these times, learning of a local, bikes-specific site with extensive trip-planning features would likely have great impact.
- Local travel-related media might also be effective, especially those featuring bike-friendly destinations -- Respondents seemed very interested in exploring outside the Bay Area with their bikes, and any related editorial or features (print, broadcast, or other) would likely draw their particular attention. Stories, features, or information about the bike trails at Northstar, for example, would be a good place to publicize the site, or within bicycling-related materials from Tahoe, Napa, or Mendocino area visitors bureaus.
- The Yellow Pages -- This venerable information source was cited as a transportation reference by bicyclists as well as by transit users. It would likely be a logical and broad-reaching medium to promote the Web Portal, and in particular the trip-planning capabilities for transit and bicycling.
- Bay Area lifestyle media -- Even with all the enhancements being considered, it seems likely from focus groups input that a bikes-specific Web site would not likely be relevant to bicyclists on a frequent, routine basis. For this reason, respondents suggested reminders of the site in some of the local lifestyle media that they use day-to-day, such as: The Bay Guardian, craigslist, CitySearch, and SF Gate.

- A RIDES.org/511 ambassador and emergency services van for bicyclists --

Respondents seemed to want a security-blanket in the form of mobile emergency services that can help them when bike shops are closed or inaccessible. A pilot program van -- perhaps in San Francisco -- could provide such services as a goodwill gesture and good form of publicity.

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Ideally, the van could double as a goodwill ambassador that demonstrates the Web site (via wireless internet) at bicycling events, and at other times circulates within the Bay Area drawing mainstream attention to bicycling as a form of transportation.

5. Features to Emphasize

- Of the features that were exposed to respondents, the navigational features were ranked most important and should be emphasized -- The trip planner and intelligent maps both seemed to convey two crucial benefits to bicyclists: first, the ability to replace troubling unknowns about a trip with comforting facts, and second, the ability to choose between the safest, easiest, or most direct route to a given destination.

Respondents indicated that the interactive maps and trip-planning features seem related; therefore, ways to functionally combine them and talk about them as a single feature should be considered. Also, we should keep in mind that although the respondents like Mapquest and loved the "Mapquest for bikes" idea, they'd prefer a trip-planner that showed options -- which is exactly what a hybrid of the trip-planner and interactive maps could do.

- The research also indicated strong potential for other, new features that were not exposed to respondents and are not currently under consideration -- Foremost among these would be any new features giving bicyclists the ability to browse, order, bid on, sell, or compare the performance of bike equipment and accessories online. Other ideas for new features that sprang from the groups included color-coded route maps with indications of steepness and hazard levels, a long-distance trip planning option that combines bicycling with transit, and a bicycle vacation-planning section of the site.

- Specific community-related features seemed least important, and should not be emphasized individually -- Features like chat rooms, email advisors, and Bike-to-Work Day support were seen as nice to have, but not too important. Perhaps community-related features should simply be lumped under a single "Community" section or heading. Under a single heading, community content would derive its importance from a cumulative collection of features, and individual features would not have to stand alone.

6. Execution Considerations for the Web Site

While this is normally a fairly extensive, separate section of our transportation research reports, we have already covered this topic in prior sections. The four categories of content, the need to signal more clearly that the site is not just for beginners, the importance of imagery that appeals to moderate bicyclists as opposed to the hard core, the use of less text and development of a "cleaner" look, the development of color-coded maps that reinforce the idea of choice and route alternatives (safest, easiest, or most direct), are some of the key execution elements that have been discussed at some length.
